



Twenty-third program report of the United States Travel Service



THE SECRETARY OF COMMERCE
Washington, D.C. 20230

APR 11 1979

Sirs:

It is my honor to submit herewith the annual report on the activities of the United States Travel Service, U.S. Department of Commerce, for fiscal year 1978, in compliance with Section 5 of the International Travel Act of 1961, as amended (22 USC 2121-2127).

Sincerely,

A handwritten signature in cursive script, reading "Juanita M. Kreps", is positioned below the word "Sincerely,".

Juanita M. Kreps

Enclosure

The President
President of the Senate
Speaker of the House of Representatives

Table of contents

INTRODUCTION	3	STATE/CITY/PRIVATE SECTOR	
Changing Market Conditions		COORDINATION	27
STIMULATING TRAVEL TO THE	4	Commerce/Cities Project	28
UNITED STATES	7	PROMOTING DOMESTIC TRAVEL	29
Consumer Motivation	7	Research	30
Consumer Education	13	Tourism Training	30
Travel Trade Education	14	Consumer/Industry Information and	
Business Travel	16	Education	31
FACILITATING VISIT USA TRAVEL	18	MONITORING INTERNATIONAL	
Encouraging the Development of Tourist		EXPOSITIONS	32
Facilities	18	TRAVEL ADVISORY BOARD	33
Development of Low-Cost Package Tours	18	USTS REGIONAL OFFICES	34
Multilingual Airport Receptionists	20	USTS FY 1978 BUDGET	35
ENCOURAGING WIDE DISTRIBUTION		ANNOTATED BIBLIOGRAPHY OF	
OF THE BENEFITS OF TRAVEL	21	USTS PUBLICATIONS	36
ENCOURAGING THE REDUCTION OF			
BARRIERS TO TRAVEL	23		
COLLECTING AND EXCHANGING			
STATISTICS AND TECHNICAL			
INFORMATION	24		

Introduction

International travel to the United States set new records* in 1978 in visitor arrivals and expenditures. Some 19.8 million international travelers visited the United States in calendar year 1978, 6 percent more than in 1977.

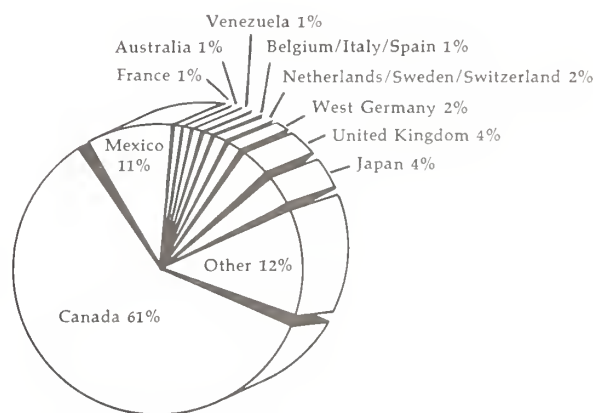
About 16.5 million of these arrivals, or 83 percent, came from the six countries where the Commerce Department maintains regional offices of the United States Travel Service (USTS): Canada, Mexico, the United Kingdom, France, West Germany, and Japan. An additional 1.1 million (5 percent) came from the eight countries where USTS operates no offices, but conducts travel promotion efforts through U.S. embassies and VISIT USA Committees representing the travel trade: Venezuela, Australia, Italy, the Netherlands, Switzerland, Sweden, Spain, and Belgium. Together, these 14 countries accounted for 17.6 million international arrivals (nearly 90 percent of the total) and an estimated \$5.9 billion in receipts (81 percent of the U.S. foreign exchange earnings from tourism) in 1978.

Travel receipts from foreign visitors in 1978 were approximately \$8.5 billion, 18 percent more than the 1977 total of \$7.2 billion (including international transportation payments made by foreign visitors to U.S. carriers). Significant increases in travel receipts were recorded for visitors from Europe (up 36 percent, with British travelers' spending up 63 percent), South America (up 22 percent), and Japan (up 24 percent).

Partly as a result of these spending increases, sizeable increases in travel dollar surpluses were noted in U.S. travel accounts with Canada, Japan and Germany. However, the U.S. travel dollar deficit remained relatively stable at around \$3 billion overall.

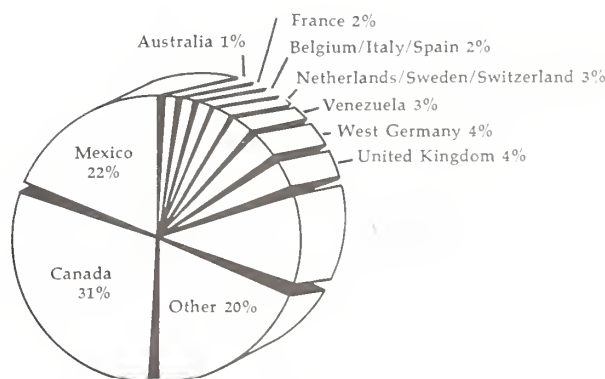
* based on preliminary estimates

Total Foreign Visitor Arrivals in the United States, 1978—19.8 Million



USTS 6 MAJOR MARKET SHARE: 83%

Total International Tourism Receipts in the United States, 1978— \$7.3 Billion + \$1.2 Billion for Transportation = \$8.5 Billion



USTS 6 MAJOR MARKET SHARE: 71%

Expenditures by foreign tourists in the United States are "export" earnings. Therefore, the continued development of international tourism to this country can help reduce both the overall trade and travel deficits.

1978 International Tourism Arrivals in the United States

Country of Origin	1978*	1977	Percent Change
Canada	12,000,000	12,083,386	- 1
Mexico	2,230,000	2,029,745	+10
Japan	880,000	748,743	+18
United Kingdom	710,000	533,244	+33
West Germany	450,000	368,587	+22
Venezuela	275,000	208,263	+32
France	250,000	215,554	+16
Australia	172,000	155,174	+11
Italy	152,000	122,108	+24
Netherlands	138,000	103,736	+33
Switzerland	118,000	89,285	+32
Sweden	98,000	75,718	+29
Spain	65,000	59,233	+10
Belgium	60,000	44,929	+34
Total	17,598,000	16,903,973	+ 4
Total all arrivals	19,800,000	18,609,794	+ 6

*Preliminary estimates based on actual arrivals data for the first 8 months of the calendar year.

1978 International Tourism Receipts in the United States (excluding transportation receipts)

Country of Origin	1978* (millions)	1977 (millions)	Percent Change
Canada	\$2,300	\$2,150	+ 7
Mexico	1,600	1,414	+13
Japan	540	436	+24
West Germany	330	261	+26
United Kingdom	325	199	+63
Venezuela	230	157	+46
France	150	120	+25
Australia	110	96	+15
Netherlands	80	57	+40
Italy	79	60	+32
Switzerland	70	51	+37
Sweden	54	40	+35
Spain	38	29	+15
Belgium	37	26	+42
Total	\$5,943	\$5,146	+15
Total all receipts (excluding transportation)	\$7,300	\$6,164	+19
Transportation receipts	\$1,200	\$1,025	+17
Grand Total Receipts	\$8,500	\$7,189	+18

*Preliminary estimates based on data provided by the Bureau of Economic Analysis for the first three quarters of calendar year 1978 and on historical trends.

M Changing Market Conditions

Marketplace conditions other than marketing activities affect travel demand. Two major factors playing a large role in the VISIT USA travel market during FY 1978 were fluctuations in foreign currency exchange rates and air

transportation developments including low fares, "open skies" policies, and new air routes.

Depreciation of the U.S. dollar against the Japanese yen, the German mark, the French and Swiss francs, and the British pound lowered the cost of travel in the United States and stimulated inbound tourism.

The degree to which a decline in the international value of the dollar stimulates foreign travel to the United States depends on two factors: 1) The extent of the dollar's decline against a given foreign currency, and 2) the extent of awareness of the "bargain" availability among the potential traveling population of that country.

Much international attention was given to the decline in the dollar's power during early 1978, and therefore the likelihood of increasing visitor flows from countries such as Japan, the United Kingdom, West Germany, and Switzerland was enhanced.

USTS capitalized on the attention focused on the decline of the dollar abroad. For example, USTS' European advertising strategy emphasized the low cost of transportation, food, lodging, and gasoline in the United States relative to prices in Europe. Using a more direct approach, USTS advertisements stressed cost awareness and the affordability of U.S. vacation destinations, rather than the strictly institutional or destination appeals used in the past.

On the other hand, the decline of the Canadian dollar in comparison to its U.S. counterpart during 1978 contributed to the generally static situation in Canadian travel to the United States.

The second factor which played a major role in the tourism marketplace during the year was the combined effect of the Administration's new international civil aviation policy, more liberal aviation regimes, and marketing by international carriers of deep-discount air fares.

There is evidence that the new low air fares, particularly from the United Kingdom, stimulated foreign tourism to the United States even more than the decline of the dollar.

Air traffic from London to New York, where fare reductions were most dramatic and most highly publicized, was 46 percent higher during the first 3 months the new fares were in effect, than during the same quarter of the previous year. British travel volume to the United States increased by about 33 percent during 1978, while arrivals from Japan, where air fare discounts were not instituted, increased approximately 17 percent.

The awarding and servicing of new air routes also expanded international travel. Air travel to the United States from Mexico rose 33 percent in 1978 following the establishment of a number of new air routes between Mexican and U.S. cities.

As is true of any economic marketplace, tourism is affected by competitive factors. The United States, as a travel destination, faced heavy competition from other country-destinations during the year. The Canadian Government Office of Tourism, concerned over Canada's deteriorating tourism balance of payments situation, especially with relation to the United States, emphasized encouraging more travel within Canada. At the same time, about 25 foreign governments were waging campaigns urging Canadian consumers to vacation in other-than-U.S. destinations.

Competition from foreign governments was also heavy in other major tourist-generating countries. For example, 65 foreign governments and at least 64 foreign airlines operated informational programs in West Germany promoting non-U.S. destinations to the German traveler. Currently, the United States receives only about 2 percent of all international travelers from West Germany.



USA window display—part of the USTS cooperative advertising program in West Germany



Baggage and bumper stickers—

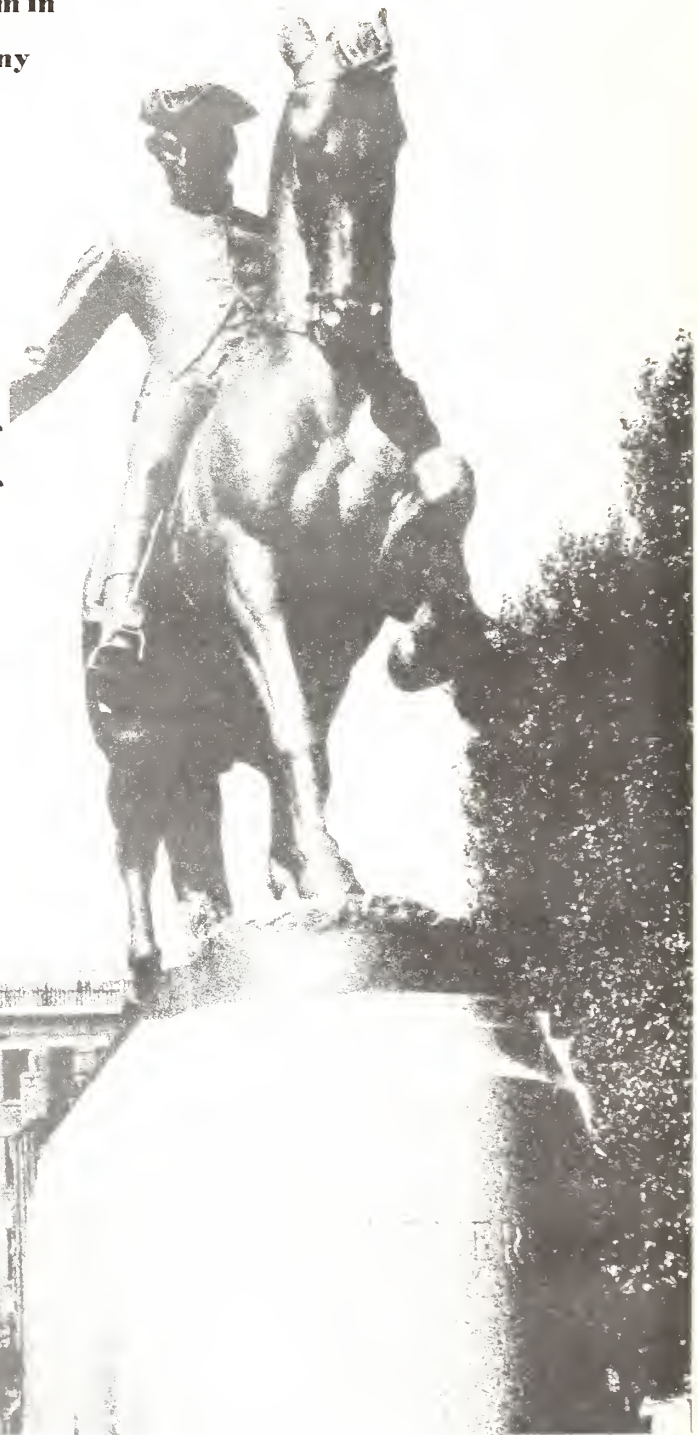


**We are French.
Help us discover America.**

USTS distributed to consumers through the French travel trade



USTS-sponsored window display—placed in 140 offices of one of the United Kingdom's largest tour companies



Stimulating travel to the United States

A primary mandate of the Secretary of Commerce under the International Travel Act of 1961, as amended, is to

“... develop, plan and carry out a comprehensive program designed to stimulate and encourage travel to the United States by residents of foreign countries for the purpose of study, culture, recreation, business and other activities as a means of promoting friendly understanding and good will among peoples of foreign countries and of the United States.”

This mandate is discharged by the Department's United States Travel Service (USTS).

Major tasks of USTS include:

1) Stimulating an interest among potential travelers to visit or revisit the United States, to stay longer, and to explore new destinations;

2) providing the information and support necessary to motivate foreign travel agents, tour wholesalers, and operators to sell U.S. travel destinations to their clients; and 3) providing information services to meet the needs of potential visitors who plan their trips independently rather than with travel professionals.

Consumer Motivation

Consumers were motivated to travel to U.S. destinations through mass media campaigns. Both advertising and media information programs were conducted in Canada, Mexico, Japan, the United Kingdom, West Germany, and France during FY 1978. These media campaigns were also designed to overcome major misconceptions about and barriers to U.S. travel.

Each country's campaign was individually tailored, with specific themes or approaches determined by market profiles and market research findings.

Media selection—whether radio, television, general circulation or special interest magazines, or national or regional newspapers—focused on major

target markets. Insertions of motivational material, including cost information, were scheduled for maximum exposure during peak travel-planning months for consumers in each country.

Slightly more than \$2 million was spent on VISIT USA advertising in FY 1978.

Market studies of travel patterns of Canadian consumers, the United States' number one market, reveal two distinct market segments: Winter and summer. For this reason, USTS carried out two separate seasonal advertising campaigns in Canada.

The winter campaign highlighted major U.S. sun destinations and publicized package tours and low-cost charter flights to the warm South, Southwest, Hawaii, and Puerto Rico. The theme of the winter advertising message was "Warm, Friendly and Familiar—That's U.S." The theme was featured in a multi-page insert in the December issue of the English and French

Canadian editions of *Reader's Digest*. The summer campaign concentrated on U.S. travel experiences that cannot be duplicated in Canada, such as a trip down the Mississippi River on a steamboat, and on family driving vacations. It was featured in a multi-page advertising supplement, also in *Reader's Digest*. Both major magazine supplements were prepared with cooperative advertising from a variety of U.S. destinations, and State and regional tourism promotion organizations, many of which received matching grants from USTS.

"Ah, Mexicanos" was the theme of the FY 1978 advertising program in Mexico. Advertisements appeared in the print and air media. Television spots based on the theme were also shown in movie theaters in Mexico City. The campaign emphasized the friendliness of Americans, encouraged Mexicans to stay longer in the United States and promoted the idea of

USA travel features—the result of USTS media information and journalist familiarization tour programs in France



USTS advertising abroad—each campaign tailored, using market profiles and market research findings, to obtain maximum response from consumers in each individual country





Deputy Assistant Secretary of Commerce for Tourism Jeanne Westphal (third from right) —with Roger Jarman (third from left), USTS regional director, and his staff in Canada during an inspection of InfoRoad USA operations

traveling beyond the traditionally-favored Southwest and Southern California destinations.

Full-color magazine ads with strong visual impact were used in the VISIT USA advertising campaign in Japan. Although Pacific island destinations, traditionally popular with Japanese travelers, were featured, advertisements also focused on Mainland destinations, specifically in the South and West.

Affordability and variety of U.S. travel offerings were highlighted in the consumer advertising campaign in the United Kingdom. Tongue-in-cheek cartoons were combined with details of holiday costs in popular American cities and resort areas.

The French campaign sought to dispel negative cliches about the United States held by many French consumers. Advertisements in national magazines and major daily newspapers in Paris emphasized unique aspects of the American culture and environment.

In West Germany, since 75 percent of travelers use package tours and there is a desire to visit the United States, the FY 1978 advertising campaign featured specific tour packages to the United States and detailed prices. The program, conducted on a cost-sharing basis with retail travel agents in Germany, was supplemented by a VISIT USA window display program, in which 316 agents in 113 German cities participated.

In addition, advertising campaigns were conducted in both Canada and Mexico in support of USTS public inquiry programs (InfoRoad USA in Canada and Info Viajes in Mexico). Direct mail promotion was also tested in Canada to determine its impact in motivating Canadian consumers to select U.S. travel destinations.

Public information programs obtained foreign media coverage designed to interest potential travelers in visiting the United States. Feature and news articles on U.S. travel destinations were prepared and placed with newspapers, magazines, and radio and television stations abroad. Special promotional events highlighting U.S. destinations, attractions, and facilities were created; local press queries concerning U.S. travel were answered; and photos of U.S. vacation spots were distributed to foreign media.

In countries where USTS maintains offices, media contact was carried out by professional public relations contractors. In 112 countries worldwide where there is no USTS presence, the International Communications Agency (ICA) distributed USTS-produced media material.

In major USTS markets, a number of motivational approaches were used to obtain media coverage.

Agency-prepared features continued to be placed with major foreign media. Features focused on U.S. destinations related by common themes: Hot air balloons, sailing, Indian-owned and -operated facilities, art colonies, gambling casinos, houseboating, theme parks, or repertory theater. Other features focused on the "how to" of travel in the United States: Traveling by train, "flightseeing" tours, four-wheel-drive touring or special vacation opportunities for children. Several of these features emphasized low-cost vacation opportunities or off-season travel.

In addition to agency-produced features, motivational features, news releases, and other information prepared by individual States, cities, regions, and components of the U.S. travel industry were also placed with foreign media.

Realizing that firsthand accounts of travel experiences strongly motivate consumers, USTS

**Foreign journalists
on the Snake River in
Idaho—part of a
USTS-sponsored
familiarization tour**



sponsored or assisted a large number of foreign journalists on inspection visits to the United States. Journalists participating in these onsite familiarization tours gathered information for stories to inform their foreign readers and viewers of U.S. travel opportunities.

A number of foreign journalists participated in USTS-sponsored "theme tours" emphasizing such travel motifs as winter sports; ranches, resorts and Indian-related attractions in the Southwest; touristic adventures on major U.S. rivers; and aviation experiences such as "flightseeing" tours, air shows and races, and glider rides.

Many non-theme tours were also arranged and sponsored by USTS. For example, Japanese journalists from the TBS television network were brought to this country to film their experiences "flightseeing" Western National Parks, touring theme parks, motoring in the United States and touring the Tucson area. Resulting from this tour project were four 50-minute, prime-time specials seen by an average audience of 7.3 million Japanese viewers. Value of these specials, if coverage had been purchased as advertising time, was well over \$2 million.

USTS arranged for French journalist Claude Villers to tour the United States by rail. Subsequently, his book, *La Route de l'Or*, was a

best seller in France in the summer of 1978, and Villers produced 10 hours of Radio-France broadcasts with an audience of 4.1 million listeners.

USTS also helped private industry and State and local governments to plan and carry out inspection tours for foreign journalists. USTS selected and invited appropriate journalists for these tours and briefed and debriefed participants.

Altogether, approximately 2,000 foreign journalists collected news and feature information in the United States in FY 1978 as participants in various types of onsite inspection tours.

In addition to these motivational techniques, special USTS promotional projects abroad focused consumer attention on VISIT USA travel:

- Working closely with Japan Air Lines, USTS participated in a U.S./Japan "Sister Cities" program. Some 49 journalists from regional newspapers in Japan visited 12 counterpart U.S. sister cities. Resulting feature stories, valued at \$1.9 million, reached an estimated audience of more than 6 million readers.
- In Paris, USTS developed bumper and baggage stickers bearing the message: "We are French. Help us discover America." Stickers were distributed to consumers through tour operators, travel agents, and VISIT USA suppliers. Reaction from media and the public was immediate and enthusiastic. Research on returning visitors

showed that 70 percent had used the stickers and praised their usefulness in establishing instant contact with Americans.

- A unique program combining a menu of American food, American music, and 648 dramatic color slides of American scenes projected onto 18 screens was featured in the popular dining room of the Wentworth Hotel in Sydney, Australia. The performance was viewed by an estimated 18,000 Australians.
- In Japan, the success of the first Ultra Quiz in 1977—a television quiz show featuring questions on U.S. travel, which drew the second highest viewer rating in the history of the prime-time “Thursday Special” network program—resulted in a sequel: Ultra Quiz II. Successful contestants on the three-part feature were filmed in Saipan, Hawaii, San Francisco, Reno, Lake Tahoe, Denver, Chicago, Niagara Falls, Boston, and New York City. Advertising value of the Ultra Quiz II program was estimated at \$2 million. The program was seen by an audience estimated at 13.8 million.



Contestants on Ultra Quiz II at Niagara Falls—a special USTS project to promote USA travel from Japan

All USTS media program results are measured by what the resulting coverage would have cost had it been purchased as advertising space. In FY 1978, the USTS media information program, with a budget of \$600,000, resulted in coverage worth approximately \$12 million in advertising-equivalent dollars.

International travel show exhibitions were also used to inform potential visitors and/or foreign travel agents about U.S. destinations. U.S. participation in such consumer travel shows increased significantly during FY 1978.

Mexico's first travel fair—"Feria de Vacaciones"—held in April 1978, brought together 7,000 consumers, 1,000 Mexican travel agents, and 44 VISIT USA exhibitors. The U.S. exhibit generated some 2,000 consumer inquiries about travel to the United States. The 4-day show featured USTS films, live entertainment by Hawaiian dancers, and characters from two theme parks.

U.S. travel exhibits were displayed under USTS auspices at a number of travel shows in Canada. These included the Toronto Sportsmen's Show, with a paid attendance of 291,000; the International Vacation Travel Show in Montreal, where public attendance reached 25,000; and two ski shows in Toronto, which drew 35,000 Canadian ski enthusiasts. USTS also coordinated U.S. exhibitor participation at Canada's largest travel show, the Canadian National Exhibition (CNE).

The first World Travel Fair was held in Tokyo in February, drawing 151,407 visitors. Many of these Japanese consumers crowded to the USTS audiovisual display, considered one of the highlights of this inaugural event.

U.S. travel was featured prominently at the third annual World Tourism and Travel Show in Paris, which attracted 80,000 visitors, including 10,000 travel trade professionals and press representatives. Nineteen U.S. industry representatives participated in the VISIT USA exhibit, which had a Far West theme. The USTS booth, enhanced by daily live performances by Hawaiian dancers and a Dixieland jazz band, generated 19,000 consumer and 1,300 trade inquiries.

USTS participated with private industry in three major tourism fairs in West Germany during FY 1978: The Internationaler Reisemarkt in Munich; the Caravan, Motor, and Tourist Fair in Stuttgart; and the Internationale Tourismus Boerse



Booths at Discover America International Pow Wow—a forum for buying and selling VISIT USA travel

(ITB) in Berlin. In addition, USTS coordinated U.S. participation in the Salon des Vacances in Lausanne, Switzerland.

Total public attendance at these four shows approached 250,000, and approximately 200,000 pieces of literature were distributed to visitors to the VISIT USA exhibit. An estimated 4,000 of these visitors received direct U.S. travel advice and information from travel counselors manning the exhibit. At the ITB in Berlin, USTS also operated a travel trade meeting facility which was shared by 60 private industry partners. At the Stuttgart event, the USTS booth display attracted an estimated 60,000 visitors, and 774 visas were issued on the spot by participating representatives of the U.S. Department of State.

Some travel shows in the United States and abroad were designed specifically to bring together foreign tour wholesalers and operators and U.S. travel suppliers (transportation companies, accommodations, attractions and destination representatives, and sightseeing firms) for face-to-face discussions and negotiations.

The best-known of these events is the annual Discover America International Pow Wow, the largest international marketplace for buying and selling U.S. tourism services. USTS is a partner with Discover America Travel Organizations, Inc.,

in putting on the Pow Wow each year. USTS actively participates in the selection and invitation of international participants and in arranging the details of buyer (primarily international travel wholesalers and tour operators) participation. The Pow Wow provides for appointments between U.S. sellers of travel arrangements and international buyers. These meetings result in contracts for U.S. travel services for future package tour offerings featuring the United States.

The 10th annual Pow Wow was conducted September 9-13, 1978, in Albuquerque, New



U.S. exhibit area at ITB (Berlin)—included a facility, provided by USTS, for U.S. travel suppliers to meet with the German travel trade

Mexico, and was attended by 511 international buyers of travel from more than 60 countries, and by 1,214 U.S. travel sellers.

According to a USTS evaluation of the 1978 Pow Wow, foreign delegates reported completing U.S. tour programs during the event which they estimate could bring up to 653,000 visitors to the United States and result in sales worth as much as \$377 million during 1979 and 1980.

Because of the popularity of the Pow Wow with both buyers and sellers, and the proven effectiveness of the Pow Wow concept, several "mini-Pow Wows" were conducted during FY 1978 at various locations in the United States and abroad.

A Swedish mini-Pow Wow held in August in Stockholm drew 40 major wholesalers, and a similar event held in Amsterdam was attended by 200 travel retailers. The "American Pie" mini-Pow Wow in London in February was attended by



**"Press
Specials" at
the Pow
Wow—a
U.S. travel
briefing for
travel trade
journalists
from around
the world**

600 British agents. This event was organized by British Airways/Speedbird (a British tour wholesaler) and cosponsored by USTS and the Mexican and Canadian government tourism offices.

The Florida Huddle, patterned directly on the Pow Wow model, was sponsored by the Florida Division of Tourism in cooperation with USTS. During the February meeting in Orlando attended by 90 international travel buyers, travel contracts valued at \$6 million were written during appointments. Florida officials forecast that the meeting would ultimately bring the state \$48 million in travel business.

Consumer Education

In some nations, consumers tend to plan their trips without the help of travel agents and to travel independently. USTS recognizes the importance of providing necessary information to these individual consumers and aiming educational efforts at them.

In Canada—the United States' number one source of foreign visitors and tourism receipts—the majority of travelers use automobiles for their trips and do not generally consult travel agents for help in trip planning. To meet the needs of these travelers, a phone-in, write-in, walk-in source of VISIT USA travel information has been provided. In FY 1978, this travel inquiry service, called InfoRoad USA, was in its third year of operation in Toronto and its second year in Montreal and Vancouver. At the request of the American Embassy in Ottawa, a toll-free number was inaugurated in the Ottawa area during FY 1978 so that consumers there could use the services of InfoRoad USA in Toronto.

The Montreal operation was a cooperatively-funded project of USTS and the States of Maine, Florida, and New York. The Pacific Northwest Regional Commission—representing Oregon, Washington and Idaho—and the San Francisco Convention and Visitors Bureau cooperated with USTS in the Vancouver operation.

During FY 1978, the three InfoRoad USA offices answered 199,630 inquiries, a 12 percent increase over the previous year. Of these inquiries, 73,420 were handled by Toronto; 60,639 by Montreal; and 65,571 by Vancouver.

Mexico is similar to Canada in that a majority of its visitors to this country travel by land and do not generally use travel agents. Meeting the need for VISIT USA information in Mexico in FY 1978 was Info Viajes USA, an inquiry service similar to

InfoRoad in Canada. The Mexico City operation counseled more than 40,000 Mexican consumers during the year.

In Japan, the United Kingdom, France, and West Germany, public inquiries in FY 1978 were fielded by USTS personnel. Their services were not heavily publicized, however, due to the limited staff ability to handle inquiries on a large scale. A total of 68,000 write-in, walk-in and phone-in consumer inquiries were serviced by these four regional offices.

This brought the total number of consumer queries handled in all six nations to more than 310,000.

Travel Trade Education

In the majority of the tourist-generating nations, a substantial portion of the traveling public uses travel agents or other travel professionals in planning trips and making travel arrangements. Consequently, educating the travel trade abroad on U.S. travel opportunities and how to sell them effectively is an important USTS function.

In cooperation with representatives of U.S. hotels and motels, airlines and other suppliers of U.S. travel goods and services, USTS conducts seminars and workshops to educate travel sellers in its designated markets.

During FY 1978, USTS sponsored or participated in 169 such seminars. More than 18,000 managers and key employees of major tour wholesalers, tour operators, air carriers, and travel agencies abroad were instructed at these sessions.

USTS/Paris cosponsored, with the VISIT USA Committee and selected tour wholesalers, a 4-day seminar and familiarization trip to New York City and Washington, D.C., for 109 travel agents from the French provinces. As a result of this project, 40 percent of the participating agents initiated VISIT USA sales activity.

USTS/Frankfurt conducted a series of travel agent seminars in 12 German cities. These seminars were attended by 500 travel agents and tour operators. Subsequently, 40 of the agents participated in a series of onsite seminars conducted in the Pacific Northwest region of the United States, and another 45 agents and operators participated in an inspection tour of Texas.



VISIT USA seminar in New Zealand—a briefing about new air routes and USA tours available for resale by the local travel trade

In Australia and New Zealand, seminar activity was carried out jointly by USTS, the respective VISIT USA Committees, and the Economic/Commercial sections of the U.S. Embassies and Consulates. In May, 1,003 Australian travel agents were briefed in seminars in Sydney, Melbourne, Brisbane, and Adelaide. In New Zealand, 270 travel consultants participated in VISIT USA seminars in Auckland, Wellington, and Christchurch. Later in the year, some 257 tour planners in Australia and New Zealand participated in in-depth VISIT USA tour-planning seminars in six cities.

In addition to sponsoring and conducting educational seminars and training sessions for the travel trade, USTS provided a continuing flow of information about U.S. destinations and attractions, tourist facilities, special events, industry tariffs, and other items of interest such as promotional films produced by U.S. cities and States. USTS regional offices abroad distributed periodic newsletters and more than 7 million destination-oriented brochures, maps and other promotional

literature for use as sales support by the travel trade in serving its customers

A directory, *Festival USA 1978*, of festivals and major events throughout the country was produced for use by the travel trade board. Consumer publications were made available in English, French, German, Spanish, and Japanese. These included:

- descriptive brochures on 20 U.S. gateway cities and their surrounding States;
- a directory of American businesses and industries which offer tours of their plant facilities;
- a shopping guide;
- a map of the United States;
- a brochure on the U.S. National Parks;
- a *USA Holiday Planner*, a consumer guide to planning a vacation in the United States, featuring all 50 States and the U.S. territories and possessions;
- a descriptive booklet of general information on traveling in the United States, including climate, driving regulations, tipping customs, etc.

Onsite inspection tours of U.S. destinations are a vital element in travel trade education, providing travel professionals with firsthand knowledge of U.S. travel destinations and facilities. USTS sponsors and conducts—with cooperation

from States, cities, and the U.S. travel industry—tours for retail travel agents, tour operators, and wholesalers.

Product inspection tours for international tour operators and wholesalers permit management-level representatives of selected tour producers to examine various tourist destinations in the United States with a view toward their inclusion in future tour packages. Each highly structured tour has fewer than 10 participants, and special provision is made for business meetings with tourism industry representatives at each U.S. destination visited.

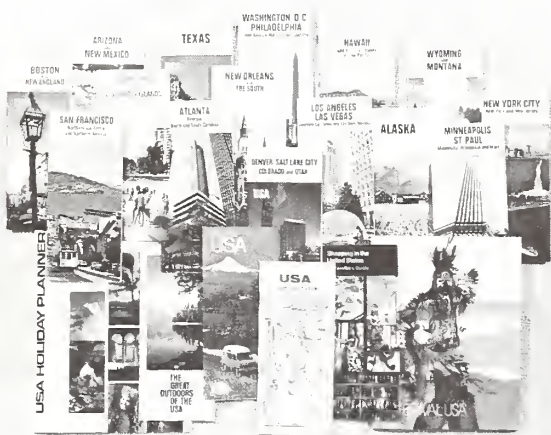
Tours for retail travel agents are designed to help them increase their sales of travel arrangements to U.S. destinations by familiarizing them with the destinations, attractions, and facilities they will be selling. Participating agents are subsequently able to make informed recommendations to their clients and to sell U.S. travel offerings more effectively.

In planning tours, USTS coordinates itineraries with State and city tourism officials to arrange ground transportation, sightseeing and accommodations; and provides tour escorts and obtains interpreters as needed.

During FY 1978, almost 5,000 retail travel agents, tour operators, and wholesalers participated in USTS familiarization tours.

USTS works closely with selected foreign retail travel agencies which have been designated as VISIT USA Travel Planning Centers. These designated agencies receive regular sales calls from USTS personnel and are provided with bulk supplies of U.S. promotional literature and display materials. Personnel of these agencies regularly participate in USTS-sponsored educational seminars and onsite U.S. inspection tours.

During FY 1978, for example, all travel agent members of the Association of British Travel Agents were invited to register as VISIT USA Travel Centers. During the year, 2,360 British agents registered under the program. Of these, 850 participated with USTS in cooperative advertising and promotion projects throughout the United Kingdom.



USTS promotional literature—current, motivational information distributed to consumers through the travel trade abroad

**VISIT USA
seminar in
Japan—a
facility for
educating the
local travel
trade about
U.S. travel
opportunities**



USTS also helps expand the capability of individual U.S.-based public and private sector travel industry groups to work more closely with the foreign travel trade. During the year, USTS assisted 37 such groups—ranging in size from 2 to 170 participants—on travel missions abroad. USTS arranged business meetings for the mission participants with selected travel agents, tour wholesalers and operators who offered real potential for increasing sales of travel to the U.S. areas or attractions represented on the mission. USTS also helped the mission participants by making follow-up calls on travel trade contacts, answering questions, and providing additional information on the U.S. areas and attractions represented.

In addition, USTS personnel abroad counseled hundreds of visitors representing U.S.-based travel industry firms on individual market conditions, more effective international tourism marketing techniques, and development of more productive travel trade contacts abroad.

Business Travel

Each year an estimated 1.9 million foreign residents come to the United States on business. To stimulate the growth of this segment of the VISIT USA travel market, USTS conducted promotion programs to boost incentive and special interest travel to U.S. destinations; to stimulate international participation in and attendance at

trade shows held throughout the United States; and to attract international conventions to U.S. sites and to increase attendance at these meetings.

USTS works closely with commercial offices of U.S. Embassies and Consulates abroad in its business travel programs—jointly sponsoring special-interest travel seminars, providing promotional literature on U.S. destinations and attractions, and counseling tour wholesalers and operators abroad who specialize in special-interest travel.

Fully or partially paid vacation packages are one of the incentives that some corporations offer their employees as a means of increasing production or sales, or improving work attendance or worker efficiency. However, many incentive packages developed for corporations abroad tend to feature destinations other than the United States.

In FY 1978, efforts were made to inform corporate management abroad of the benefits of incentive travel and to persuade incentive tour operators to include U.S. destinations in the packages they develop for their corporate clients.

Brochures and audio-visual materials about incentive travel were provided to airlines, travel agents and tour operators abroad for use in their contacts with executives for foreign companies considering incentive travel programs. In this connection, USTS produced a new brochure—*The Total Incentive Experience: USA*—in English, Spanish, and French.

Incentive travel seminars were conducted in four countries by USTS staff members and private incentive travel specialists. One such seminar, held during FY 1978 in Canberra, Australia, was designed to demonstrate how this type of travel offering can be a positive and constructive tool to increase the productivity and profitability of a company. Featuring an address by the United States Ambassador to Australia, the conference was supported by USTS through the participation of the Economic/Commercial Section of the American Consulate General in Melbourne. Attendees included 44 senior company executives, 30 executives of travel organizations, and 2 travel trade journal editors.

An estimated 8,550 international visitors and \$6.5 million in foreign exchange earnings were generated by these program efforts.

More than 500 U.S. trade shows of interest to foreign businesses were identified and published in USTS' annual *Directory of U.S. Trade Shows, Conventions and Expositions*. The publication is used extensively by USTS abroad to encourage tour operators to develop and promote special packages featuring these events for foreign business visitors.

Seventy-six U.S. trade shows were certified in FY 1978 under the Trade Fair Act of 1959, which entitles foreign exhibitors to bring their products into the United States for display during scheduled events duty free.

One hundred trade show organizers were counseled by USTS on ways of making their events more attractive to international attendees. Suggested techniques included foreign language promotional brochures, foreign currency exchange facilities, conference programs, multilingual translation services, and special tours for spouses of delegates.

The *Directory of Trade Shows, Conventions and Expositions*, brochures, and other pieces of information about U.S. trade shows were distributed abroad by USTS and commercial officers of U.S. Embassies and Consulates.

An on-going series of personal visits were made to selected international associations headquartered in Europe whose by-laws permit them to hold meetings in the United States. Information collected during these calls were

computerized and distributed to 68 U.S. convention and visitors bureaus for follow-up action.

U.S. affiliates of the international associations, or host associations, were counseled in the organization of congresses involving foreign participation. Counseling included information on providing translation facilities, receptive services, and foreign language conference programs and literature. Some host associations received financial assistance in matching grants to provide simultaneous translation services during their congresses.

In addition, specific measures were taken to boost international attendance at scheduled congresses:

- International tour producers abroad were assisted in assembling package tours for delegates attending the congresses and developing special pre- or post-convention tours.
- Convention brochures and other promotional material for the congresses were distributed to organization affiliates through USTS offices abroad.

During FY 1978, 24 international congresses promoted by USTS were held in U.S. cities. International attendance at these meetings totaled 13,960, and resulting foreign exchange earnings have been estimated at \$5.9 million.

Thirty-five future international congresses, scheduled to be held through 1983, were obtained for U.S. locations through USTS efforts during the year. These congresses are expected to draw an estimated 18,550 international delegates and should result in foreign exchange earnings of nearly \$8.6 million.

During the year, USTS also conducted a site inspection tour for international association executives to examine congress facilities first-hand in U.S. cities interested in hosting congresses. The executives surveyed facilities in Washington, D.C.; San Francisco; Reno; Denver, and Des Moines, and met with officials of the convention and visitors bureaus in those cities.

**U.S. trade show—
USTS promoted
international
attendance and
assisted organizers
provide special
services for foreign
visitors**



Facilitating Visit-USA travel

The International Travel Act directs the Secretary of Commerce to

“... encourage the development of tourist facilities, low-cost unit tours, and other arrangements within the United States for meeting the requirements of foreign visitors.”

Encouraging the Development of Tourist Facilities

In FY 1978, as part of an interagency study of the economy of Puerto Rico, USTS identified possible programs which, if implemented, would upgrade or increase tourist facilities in the island Commonwealth.

Portions of the study will be used to develop a tourism master plan for Puerto Rico, to be prepared as a result of a request for technical assistance made by USTS to the Organization of American States on behalf of the Commonwealth of Puerto Rico. USTS will participate as a consultant in the preparation of the plan.

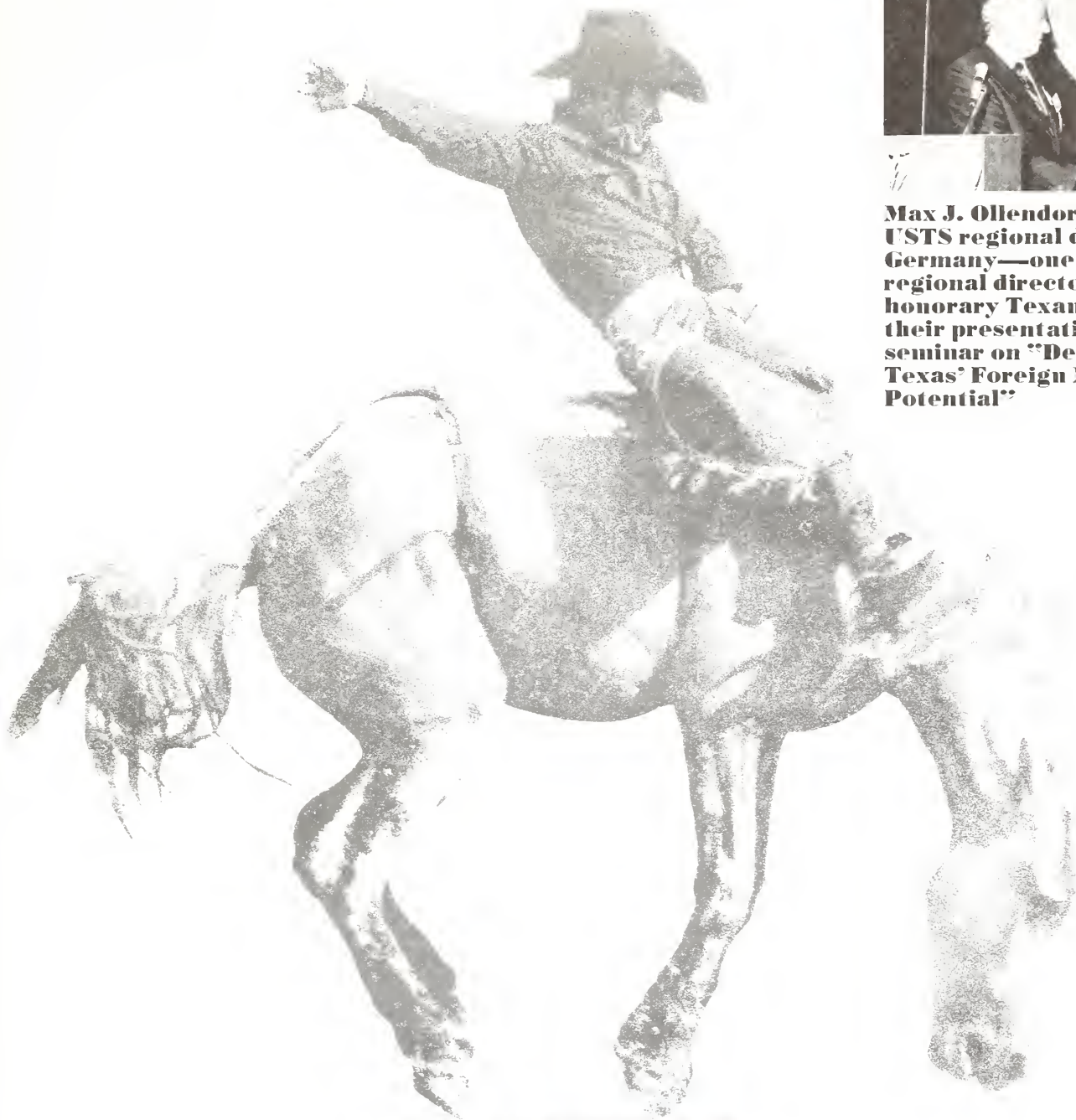
Development of Low-Cost Package Tours

Just as an American vacationing abroad for the first time often purchases a package tour as a convenient and economical way plan travel, many international visitors turn to package tours to facilitate their U.S. vacations. Such packages offer a number of significant advantages for incoming tourists: Costs are usually lower than for independent travel arrangements; packaged arrangements eliminate the necessity for travelers to make their own detailed plans, thus saving time and effort in advance of the trip; and tour escorts help overcome language barriers feared by many non-English-speaking travelers.

Market studies have shown that packaged arrangements are particularly important when marketing travel to potential tourists in countries such as Japan, where the foreign language barrier is regarded as significant and where the lifestyle has made group activity the norm. In other consumer markets, package tours are valued most highly from the point of view of cost-savings involved.

USTS helps foreign tour operators create package tours to the United States by providing a wide range of support programs, including technical support, product promotion, and financial assistance. USTS development efforts are designed not only to achieve a steady growth in the number and quality of VISIT USA package offerings, but also to introduce “new” U.S. destinations to travel consumers and to encourage new foreign tour operators to enter the U.S. market.

Financial support provided under a tour development contract may cover items such as production and distribution of brochures, tour catalogs, and sales promotion materials such as posters and other displays; trade or consumer advertising in support of tour offerings; direct-mail promotion; and training or familiarization programs for retail travel agents who are the sales outlets for tour operators.



Max J. Ollendorff (right), USTS regional director for Germany—one of three USTS regional directors named honorary Texans following their presentation at a seminar on "Developing Texas' Foreign Market Potential"

Roger P. Biver (far right), USTS regional director for the United Kingdom—on hand for ceremonies opening Braniff International's London ticket office.



During FY 1978, USTS invested \$961,020 in tour development projects which were expected to generate an estimated \$603,273,600 in tourism earnings for the United States.

In Japan, USTS participated in a number of tour development projects, including

- introduction of a new type of package tour, brand-named "Zero." "Zero" tours, operated by Japan Creative Tours, are inexpensive, do-it-yourself packages aimed specifically at the youth and repeat-visitor markets. As a result of USTS support, the tour operator agreed to feature U.S. destinations in more than 70 percent of its entire "Zero" tour offering for the year.
- a project in which more than 515 members of the Japan Disabled Veterans Association traveled on a package tour to Hawaii to exchange greetings of friendship with their former adversaries of World War II. Other members of the veterans' organization are planning a second tour.
- a large-scale youth tennis tour, during which 445 Japanese visited California tennis resorts in the summer. The success of the project has stimulated the operator to plan an extended tennis program for next year.

Other tour development projects supported by USTS included three ski vacation packages to destinations in the Rockies and Sierras—the first U.S. ski tours to be offered in the United Kingdom; a German air/bus tour to the Grand Canyon and American Indian attractions in the Southwest; and a French tour to attractions in Philadelphia; Washington, D.C.; Williamsburg, Virginia; and Savannah, Georgia, associated with Colonial America.

Hartsfield Atlanta International Airport and Dallas/Fort Worth Airport were added in FY 1978 to a network of 12 other major U.S. airports where USTS sponsors international visitor receptionist programs.

Multilingual Airport Receptionists



**USTS
airport re-
ceptionists
—stationed
at 14 major
U.S.
airports to
provide
multi-
lingual
assistance
to incoming
foreign
travelers.**

The uniformed corps of multilingual receptionists welcomed incoming international travelers and assisted them with entry formalities. In addition to explaining Federal inspection procedures, the receptionists helped visitors fill out Customs and Immigration forms and served as interpreters for both the visitors and for U.S. inspection personnel during the entry process. Interpretive services were available in 21 languages, ranging from Spanish, French, German, and Japanese to Serbo-Croatian, Arabic, Chinese, and Russian.

Other airports where receptionist programs operated during the year were New York City (John F. Kennedy International); Seattle; San Juan, P.R.; Philadelphia; Miami; Washington, D.C. (Dulles International); Boston; Chicago; Los Angeles; San Francisco; Honolulu; and Bangor, Maine.

Approximately 100 of these receptionists were college students working part-time under the College Work/Study Program of the Department of Health, Education, and Welfare. Another 50 provided year-round professional receptionist service and served as supervisors.

The multilingual airport receptionist programs are cooperative projects between USTS and the respective city's convention and visitors bureau, airport authority, or municipal government. In addition, because of the nature of the programs, USTS works closely with the Federal agencies who have inspection responsibilities at U.S. ports-of-entry: The Immigration and Naturalization Service, U.S. Customs Service, and Public Health Service.

Encouraging wide distribution of the benefits of travel

A third duty of the Secretary of Commerce under the International Travel Act of 1961, as amended, is to

“... foster and encourage the widest possible distribution of the benefits of travel at the cheapest rates between foreign countries and the United States consistent with sound economic principles.”

During FY 1978, the Commerce Department encouraged wider distribution of the benefits of travel in a variety of ways. The Assistant Secretary for Tourism participated in negotiations which resulted in the first new air transport bilateral accord to be concluded by the United States and Mexico in 7 years. The two governments agreed to encourage the airlines of their respective countries to “offer services at the lowest possible fares and rates,” and to institute “. . . innovative reduced passenger and cargo fares and rates. . . .”

Both governments recognized the important contribution of charters to international tourism between the two nations and resolved to “continue to apply liberal policies with regard to charter flight operations; and to permit “charter flight operations with the fewest possible restrictions.” The agreement also provided for new or improved air service for 31 American cities and 23 cities in Mexico.

As a member of the Interagency Policy Committee on Civil Aviation, the Assistant Secretary for Tourism helped to shape the Administration’s new aviation policy which guides the conduct of international air transport negotiations.

The Department participated in a number of bilateral aviation negotiations during the year in which the new aviation policy was applied, including negotiations with the Federal Republic of Germany which resulted in the conclusion of a new civil air agreement. The agreement provides that fares and rates and charter rules will be subject to the sole control of the country of origin. Under the new agreement, both countries are able to designate any number of airlines for flights between the two countries, and airlines are able to operate without restrictions on capacity.

Talks with the United Kingdom produced an extension of the 6-month experimental low-fare regime which went into effect in March 1978. Subsequently, letters were exchanged committing both countries to continued reduction of government intervention in airline pricing decisions. Both sides also agreed to eliminate government-imposed capacity limits on seats offered at deep-discount fares and requirements that deep-discount tariffs include a specific government-imposed expiration date.

As a result of bilateral aviation talks between the United States and Belgium, the delegations agreed to recommend to their respective

governments the conclusion of a protocol which would significantly expand mutual airline service opportunities. Low-cost travel options for passengers between the United States and Belgium are expected to be enhanced by provisions which encourage innovative pricing and increased opportunities for airlines.

In the Tourism Committee of the Organization for Economic Cooperation and Development, the Commerce Department (through USTS) supported the principle of low air fares and maximum competition. The United States played a major role in drafting a report which concluded that: "In the future, scheduled and non-scheduled traffic will need to be able to compete on an equal basis, if potential travelers by air are to be offered as wide a selection as possible."



Assistant Secretary of Commerce for Tourism Fabian Chavez, Jr. (left) —with Secretary of State Cyrus Vance (center) and Assistant Secretary of State for Inter-American Affairs Terence Todman following the conclusion of a major U.S./Mexico tourism agreement

Encouraging the reduction of barriers to travel

The International Travel Act of 1961, as amended, authorizes the Secretary of Commerce to

“... encourage the simplification, reduction, or elimination of barriers to travel, and the facilitation of international travel generally.”

In FY 1978, USTS participated in a number of actions designed to achieve these goals.

Discussions were held with the Government of Mexico resulting in a bilateral agreement on tourism. Signed in May, it was the first such agreement in the diplomatic history of the United States.

The Assistant Secretary for Tourism coordinated the U.S. delegation, which included representatives from the Southwest Border Commission and the State Department's Visa Office, Office of Mexican Affairs, and Legal Adviser's staff. The U.S. delegation received policy

guidance from the Immigration and Naturalization Service, the U.S. Customs Service, the Bureau of Indian Affairs, Amtrak, and the International Communications Agency.

The tourism agreement commits the two countries to consult on the opening of additional border crossing points, and to consider waiving applicable visa fees for the entry and exit of teachers and experts in tourism. A formal exchange of diplomatic notes making the pact effective was expected early in 1979.

Historically, international forums and specialized organizations concerned with tourism globally have tended to accord a higher priority to research and technical assistance than to facilitation of tourism and elimination or reduction of barriers to travel. This has been the case, for example, in regard to the World Tourism Organization (WTO), an intergovernmental organization affiliated with the United Nations.

However, in FY 1978, at the Ninth Executive Council of the World Tourism Organization, the U.S. delegation proposed the establishment of a WTO Working Party on Facilitation. The proposal was offered at the request of elements of the U.S. travel industry who are non-voting, affiliate members of WTO.

The Executive Council adopted the U.S. proposal, and establishment of the Working Party on Facilitation was expected early in 1979.

The United States also contributed to a major WTO effort to develop a Tourism Code of Conduct and Bill of Rights. The documents, which will define the respective rights and responsibilities of tourists, host communities, governments, and the travel industry, were proposed by the United States delegates to the WTO General Assembly in 1977.

In FY 1978, USTS nominated Dr. Thomas Hale Hamilton, President Emeritus of the University of Hawaii, to serve as one of two representatives of the Regional Commission for the Americas on a WTO Working Party to draft the Tourism Code of Conduct and Bill of Rights. Hamilton's nomination was subsequently approved by the Commission.

Collecting and exchanging statistics and technical information

Under the provisions of the International Travel Act of 1961, as amended, the Secretary of Commerce must

“ . . . collect, publish and provide for the exchange of statistical and technical information, including schedules of meetings, fairs and other attractions relating to international travel and tourism. . . . ”

In 1978, two types of research were performed: Analysis of basic data and consumer market research.

Basic data were collected, analyzed and published to provide a regular and ongoing description of the current dimensions of the international travel market, the potential VISIT USA market and the position of the United States in the global market. Such information included

monthly foreign visitor arrival figures, quarterly travel receipt and expenditure data, analysis of government entry forms, and U.S. citizen departure information.

Data were exchanged with other Federal agencies and government tourism offices around the world to improve the reliability of international travel information.



Beverly D. Shipka, deputy director of USTS' Office of Policy and Research— participating in a seminar on attracting more international visitors to Louisiana

As a result of the bilateral tourism agreement between the United States and Mexico, discussions were held with Mexican tourism research officials to resolve discrepancies in travel data generated by the two countries and to establish procedures for a ready flow of statistical and market research information between the respective government tourism offices.

The annual market survey of the Canadian vacation travel market was again carried out, cosponsored by the United States Travel Service and the Canadian Government Office of Tourism. Additionally, USTS and another Commerce agency, the Bureau of Economic Analysis, exchanged data and worked with Statistics Canada, the statistical arm of the Canadian Government, in gathering, analyzing, and reporting information on travel between the two countries.

Consumer market research projects were designed to provide indepth marketing information on characteristics of the current and potential U.S. travel markets.

In FY 1978, comprehensive reports were published for a series of 11 individual country

market research surveys for Mexico, Japan, the United Kingdom, West Germany, France, Australia, Venezuela, Italy, the Netherlands, Sweden, and Belgium. The studies, the first indepth, concurrent set of surveys ever conducted by USTS, investigated the international travel habits, patterns, and preferences of residents of these countries. Two additional reports stemming from these studies were also prepared and issued. The first analyzed, for the 11 markets, international traveler perceptions of the United States as compared to all other international destinations—indicating the strong and weak competitive attributes of the United States. The second provided indepth analyses of international travel to each of the 8 Continental U.S. tourist regions, as well as an overview of international travel to the U.S. Islands.

Research data and marketing studies are used by members of the U.S. travel industry as statistical bases for their own marketing activities. Ultimately this research foundation helps increase the U.S. share of the tourism market in a cost-effective manner.

USTS research publications—a variety of current statistical and marketing research information to assist the U.S. travel industry develop international tourism to this country





**USTS State/City Days Conference
—questions and answers about the
National Tourism Policy Study**

**Jeanne Westphal, Deputy
Assistant Secretary of Commerce
for Tourism—with State and local
tourism officials during State/City
Days Conference**



State/City/private sector coordination

The International Travel Act of 1961, as amended, gives the Secretary of Commerce authority to award grants to States, cities, and non-profit organizations for international tourism promotion projects. Grants may be used for projects promoting international travel to the United States or for improving receptive services for foreign visitors.

Due to increased State and municipal interest in tourism as an economic development tool, competition for a share of less than \$600,000 available in Federal matching funds in FY 1978 was at an all-time high. To allow equitable distribution of funds and to ensure selection of those programs offering the greatest potential for success, it was necessary to limit the grant application period. Applications were received in September 1977, and all awards were announced in early December 1977. Some 142 applications seeking more than \$1 million in Federal funding were received. From this number, 70 grants were awarded.

Awards were based on criteria which gave high point value to those showing valid potential for increasing foreign exchange earnings. Funds in FY 1978 were granted principally for media advertising, visitor facilitation, research, tour development, and simultaneous translation services

for international congresses held in the United States.

USTS consulted with State and local officials during the year on simplifying application procedures and streamlining the program to make it more responsive to the needs of tourism organizations. Paperwork requirements were simplified and FY 1979 application forms were tailored to allow more complete evaluation of the total tourism development proposals.

USTS continually communicates with State, city and regional officials on tourism issues and activities. This coordination ensures unified efforts and maximum tourism development results.

Coordination is enhanced through the annual State/City Days Conference, which brings together representatives of States, territories, and cities for indepth discussions of tourism issues and briefings on future projects.

A State/City Days Conference was held in early November 1977 and drew participants from 51 States and territories and more than 70 cities. The agenda was designed to allow ample opportunity for delegates to participate actively in commentary and evaluation on existing and proposed USTS programs and activities. Panel discussions and presentations also covered such topics as the National Tourism Policy Study, highway and directional signing of tourism attractions and services, outdoor recreation resources, tourism as an economic development tool, and promotion of tourism from the State/city point of view.

U Commerce/Cities Project

USTS and other Department of Commerce agencies participated in a coordinated economic development program, working with selected cities, to help solve such problems as urban business decay and high unemployment. Called the Commerce/Cities Project, this pilot program demonstrated how existing Departmental resources could be used collectively to help cities to create jobs, encourage capital investment, and stimulate inner city economic development. The USTS role in this Department-wide project was to help selected cities to use tourism as an economic development tool.

Long Beach, California; Portland, Oregon; Baltimore, Maryland; Greenville, South Carolina; St. Louis, Missouri; Hartford, Connecticut; and Detroit, Michigan, were among selected cities assisted by USTS during FY 1978.

Working with officials in Greenville, USTS was instrumental in establishing the Discover Upcountry Carolina Association, a tourism promotion voice for the six Piedmont counties of the State. USTS continued to provide technical assistance to group members as they inventoried their tourism resources, researched their markets, and developed a comprehensive tourism plan.

USTS worked closely with city officials in Baltimore in developing a viable convention promotion program.

St. Louis was assisted in developing a comprehensive tourism promotion program, and USTS helped Detroit and Long Beach officials draw up tourism development plans. Portland, Oregon, received technical assistance in planning a Portland travel film, Oregon Coast travel exhibit, and a program to promote the city's convention facilities.

USTS helped Hartford, Connecticut, officials research the economic benefits of tourism to the city.



**City tourism officials—
a working session
during State/City Days
Conference**

Promoting domestic travel

T

he Domestic Travel Act of 1940, as amended in 1975 by P.L. 94-55, directs the Secretary of Commerce to promote domestic travel

“... through activities which are in the public interest and which do not compete with activities of a State, city or private agency.”

The Secretary's authority under this statute has been exercised by the United States Travel Service.

FY 1978 marked the culmination of a domestic tourism development program established by USTS in 1977. Programs in FY 1978 were designed to enhance the tourism development capability of regional, State, and local public and private sector organizations through research, education, technical assistance, and Federal interagency cooperation.

Major objectives of the domestic program during FY 1978 included:

- Provide information and technical assistance to regions, States and localities on developing tourism programs that foster economic growth while protecting the environment.
- Provide specific U.S. tourism information to the consumer, travel trade, States, and regions to increase domestic travel expenditures through consumer selection of domestic destinations and longer lengths of stay.
- Inform consumers of the value of proper trip planning, stressing fuel-efficient travel, effectiveness of mass transportation, advantages of off-season travel, and the educational and health benefits of vacation travel.
- Foster the growth of the tourism industry by developing training modules for tourism decision-makers, to provide them with information needed to achieve greater economic gains through effectively planned and conducted tourism programs.
- Provide industry and government with an assessment of the dimensions of the U.S. travel market, especially in travel's contribution to the economy and to employment.
- Help regions, States and cities obtain local travel data to enable them to assess their needs for tourism development programs and to plan and implement effective programs.

Program activities were in three main categories: Research, training, and consumer/industry information and education.

D **Research**

Domestic tourism research provided reliable, consistent statistical information on the volume of domestic travel, characteristics and motivations of American travelers, and the economic impact of travel in the United States.

The \$450,000 program had two sections: A basic national data program and a local tourism data development program.

In FY 1978, in conjunction with the Department of Commerce's Bureau of the Census, USTS began publishing interim data collected for the 1977 National Travel Survey. More complete data packages will be published in 1979. The 1977 National Travel Survey was conducted by the Census Bureau with USTS and Department of Transportation participation, and involved field surveys of 24,000 American households.

Data on the volume of domestic travel during 1977 are being packaged to provide individual profiles for each of the 50 States, selected profiles for metropolitan areas, and profiles on selected market segments such as air travelers, weekend travelers, campers, and skiers.

The local tourism data program complemented this basic national data program by providing guidelines for use by regions, States, and localities in planning, implementing, and evaluating tourism programs to meet their particular needs.

During FY 1978, several projects designed to provide these guidelines were completed and the project results published (See Bibliography). Included were joint Federal/local projects in the State of Washington—to demonstrate methods for developing and conducting local travel research surveys—and in the State of West Virginia—to provide tested guidelines for communities and regions to design and implement plans for economic development through tourism. The West Virginia study was conducted by West Virginia University and jointly funded by USTS; the Economic Development Administration, U.S. Department of Commerce; the Employment and Training Administration, U.S. Department of Labor; the Small Business Administration; the

West Virginia Governor's Office of Economic and Community Development; and West Virginia University.

P **Tourism Training**

Projects to design tourism training packages were completed during the year to meet the needs of State and local officials for assistance in developing tourism as a viable industry in their respective areas. One project, conducted by the University of Missouri for USTS, was designed to aid communities to develop tourism as part of their overall economic development plans. The results of the project were published in four volumes:

- "Appraising Tourism Potential"
- "Development"

Section 1: Planning for Tourism

Section 2: Assessing Your Product and the Market

- "Implementation"

Section 1: Marketing Tourism

Section 2: Visitor Services

- "Sources of Assistance"

A second project, conducted for USTS by the United States Council of State Governments, addressed the role of State government in economic development through tourism. In addition to soliciting information from all 50 States, indepth interviews were conducted with 10 geographically representative, highly successful State tourism offices to determine their administrative structure, program techniques, and intergovernmental and government/industry cooperation.

These techniques and methods were analyzed, as well as methods used by the States to justify and effectively use tourism budgets. A preliminary report of the findings of the project, with a prototype model for use by other States in creating more effective travel and tourism operations, was presented for discussion to decision-makers in the

executive and legislative branches of State governments and members of the travel industry in five regional seminars during the year. Seminars, held in Boston, Atlanta, Chicago, Oklahoma City, and Las Vegas, were attended by nearly 800 government and industry representatives.

A final report on the project was expected to be published early in 1979.

B Consumer/Industry Information and Education

Both advertising and media services campaigns were used during FY 1978 to persuade Americans to travel within the United States and to encourage the U.S. travel industry to emphasize the United States as a travel destination.

A public service advertising campaign continued to emphasize "America First" as an economical and enjoyable vacation destination. In addition, off-season vacations and fuel-efficient travel were encouraged. Elements of the nationwide campaign included radio and television spots, a magazine ad, a television talk show kit, and a promotion folder. The theme was "See More of America—A Little Planning Means a Longer Stay." Estimated dollar value of the public service campaign totaled approximately \$6.1 million and reached an audience estimated at 30 million.

A series of nine brochures, called "Consumer's Guide to Travel Information," was offered to the

public in newspaper advertisements, radio public service announcements, and feature articles placed in U.S. newspapers and magazines. More than 300,000 brochures, which contained "how to" tips for American travelers, were distributed.

A domestic media information program was also used to motivate U.S. travelers to vacation in their own country and to provide them with needed how-to-travel information.

Features, similar to those used by USTS in its international tourism promotion programs, were placed with domestic newspapers and magazines, covering a wide variety of U.S. destinations linked by common travel themes. During FY 1978, a number of these feature story themes dealt with off-season travel, Indian-owned and -operated travel attractions and facilities, and little-used National Parks.

"How-to-travel" articles were also prepared, dealing with such topics as travel tips for senior citizens, low-cost air fares, how to use a travel agent, and traveling with pets. In addition, many of these "how-to" articles were reprinted in brochure form and widely distributed to consumers.

The air media were also used to reach consumers with timely travel information. The weekly radio show "Pathways USA," was carried regularly by 1,084 stations nationwide. This travel show was also heard in Canada and overseas through the Voice of America and the Armed Forces Radio Network.

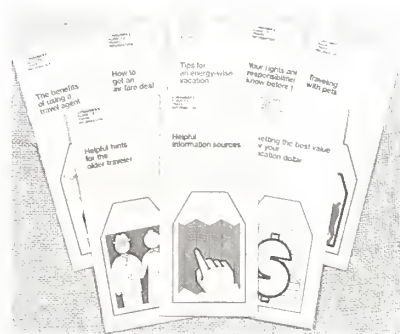
USTS personnel appeared on radio and television talk shows in 17 U.S. cities, telling audiences how to travel and where to write or call for more consumer information.

Onsite inspection tours of U.S. travel destinations were also organized for domestic travel writers. Tour itineraries emphasized cities with high unemployment rates and little-used National Parks.

These combined domestic media information programs produced results valued at more than \$3.5 million, if purchased as advertising.

Funding for USTS' domestic tourism development program terminated with the end of FY 1978.

**"Consumer's
Guide to Travel
Information"—
brochures
containing tips
for American
travelers**



Monitoring international expositions

Under P.L. 91-269, the Secretary of Commerce is responsible for evaluating applications from private organizers for Federal recognition of international expositions and coordinating the development of a plan for Federal participation in the expositions to be held in the United States. These functions are performed for the Secretary by the United States Travel Service.

International expositions are important because they attract large numbers of domestic and international visitors, result in substantial foreign exchange earnings for the host country, and serve as important instruments of national policy, particularly in exchange of ideas and demonstration of cultural achievement. Equally important, world's fairs generate jobs and, in many cases, provide the catalyst for urban redevelopment.

In FY 1978 ongoing counsel and technical assistance were provided to a number of U.S. cities proposing to host international expositions during the 1980's.

USTS continued to monitor progress of plans for Energy Expo '82, scheduled for Knoxville, Tennessee, May 1 through October 31, 1982. This "special category" exposition, focusing on energy, had been accorded Federal recognition by President Carter in 1977.

The Secretary was expected to recommend early in FY 1979 that the President issue a formal invitation to the nations of the world to participate in the exposition. At the same time, the process of Federal participation, including the design and construction of a Federal pavilion and the appointment of a U.S. Commissioner General to oversee the event, was expected to be officially set in motion.

Travel Advisory Board

The Travel Advisory Board (TAB) was established in 1968 to advise the Secretary of Commerce on tourism development programs and policies. Chaired by the Assistant Secretary for Tourism, the Board has 15 representatives from private and public organizations involved in travel and tourism. The TAB meets quarterly—or more often if necessary—and members are appointed for 2-year terms. The following represented their respective segments of the travel and tourism community as members of the TAB during FY 1978:

Robert L. Brock Accommodations
President
Topeka Inn Management, Inc.
2209 West 29th Street
Topeka, Kansas 66611

Miriam Cutler Consumers
President and Director
Aviation Consumer Action Project
1346 Connecticut Avenue, NW
Washington, D.C. 20036

Martin B. Deutsch Communications
Editor and Publisher
Reuben H. Donnelley
Travel Magazine Division
888 Seventh Avenue
New York, New York 10019

Edward J. Driscoll Transportation
President
National Air Carrier
Association, Inc.
1730 M Street, NW
Washington, D.C. 20036

Charles Gillett Cities
President
New York Convention and Visitors Bureau
90 East 42nd Street
New York, New York 10017

James A. Henderson Financial Institutions
Executive Vice President
American Express Company
American Express Plaza
New York, New York 10004

Dr. Cyril C. Herrmann Research
Vice President
Arthur D. Little, Inc.
One Maritime Plaza
San Francisco, California 94111

Robert E. Juliano Labor
Legislative Representative
Hotel and Restaurant Employees and
Bartenders International Union
1666 K Street, NW
Suite 304
Washington, D.C. 20006

James Miller Travel Industry
Associations
President and Chairman of the Board
American Society of Travel Agents
711 Fifth Avenue
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Canada M5K1K7

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Canada V6E2Y4

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United States Travel Service
Rossmarkt 10
6000 Frankfurt Am Main
West Germany

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InfoRoad USA
1200 McGill College Avenue
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Canada H3B4G7

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Manuel Avila Camacho #1
Plaza Comermex, Office 1303
Reforma y Periferico
Mexico 10, D.F.
Mexico

France

United States Travel Service
23 Place Vendome
75001 Paris
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United States Travel Service
Kokusai Building
3-1-1, Marunouchi
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Room 225—A Building
2 Avenue Gabriel
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22 Sackville Street
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United States Travel Service Budget

FY 1978 BUDGET* (in thousands of dollars)

	Permanent Positions	Amount (\$000)
Promotion of Travel to the USA:		
Canada	8	\$ 756
Mexico	7	466
United Kingdom	9	654
France	7	649
West Germany	8	798
Japan	8	802
Special Markets	2	313
International Congress Sales	4	160
Marketing Programs	7	246
Advertising and Promotion	8	3,935
Familiarization Services	5	134
Media Services	8	287
<i>Subtotal</i>	81	9,200
Tourist Services and Facilities:		
Language	1	300
Industry and State Programs:		
Research and Analysis	7	779
Conventions and Expositions	9	352
Matching Funds Program	3	646
Domestic Tourism Promotion	6	1,008
<i>Subtotal</i>	26	2,785
Executive Direction	27	1,905
<i>Subtotal</i>	27	1,905
 Total	134	14,190

*This covers the Fiscal Year from October 1, 1977
through September 30, 1978

Annotated bibliography of USTS publications

*Directory of U.S. Trade Shows, Expositions and
Conventions*
(Annual)

The directory lists more than 600 trade events being held in the United States, as well as foreign-based international conventions being held in the United States. The directory is used primarily by foreign service posts, other government agencies, and private professionals involved in promoting attendance at these trade shows and conventions.

Copies free upon request. Contact: Marketing and Conventions Division, United States Travel Service, U.S. Department of Commerce, Washington, D.C. 20230.

DOMESTIC TOURISM RESEARCH PUBLICATIONS

*Identifying Traveler Markets: Research
Methodologies and Non-Resident Air Travel to
Washington State*

This study was designed to guide regions, States, and cities in developing and conducting travel research studies. Part I of the manual focuses on research techniques in the collection of data which can be used as a basis for tourism marketing programs which contribute to the overall economic goal for the area. Among topics discussed are: Defining travel research terms; deciding if resources are adequate; defining objectives; sampling; enlisting cooperation of government agencies and carriers; preparing field materials; field administration; quality control; data processing, and analysis and reporting.

Part II of the manual includes a survey of non-resident air travelers who visited the State of Washington during 1977. The survey was conducted to test the air travel surveys portion of the manual.

Creating Economic Growth and Jobs Through Travel and Tourism: A Manual for Community and Business Developers

This study provided tested guidelines for communities and regions for designing and implementing plans for economic development and growth through the travel and tourism industry. The manual includes a comprehensive model for a 5-year community development plan, and a planner's manual to help local authorities apply the model to their communities and/or areas. It was primarily written for use by county level organizations and governments with little or no formal training in economic planning and development through tourism.

The study was to be conducted in two phases. Phase I would include guidelines on conducting a resource inventory, a community and business survey, a legal survey, an economic impact survey, a segmentation analysis, a forecast, and developing short- and long-term marketing strategies. Phase II would involve evaluating and testing the guidelines used in the demonstration area. It would involve economic impact measurement, marketing, community information and awareness programs, industry awareness, and identification programs, human resources development, and community involvement.

The study was conducted by West Virginia University, and funded by the United States Travel Service (lead agency), the Economic Development Administration (U.S. Department of Commerce); and the Small Business Administration; the Employment and Training Administration (U.S. Department of Labor); the West Virginia Governor's Office of Economic Community Development; and West Virginia University.

City Government, Tourism and Economic Development

This study identified and described the major activities which make tourism development an

increasingly significant component of a city's overall economic development program. Conducted for USTS by the U.S. Conference of Mayors, the study was based on a mail survey of travel and tourism programs in all cities with populations of over 100,000 and case studies in four selected cities. It was developed as a guide for cities considering tourism planning and promotion, and seeking general background information and individuals to contact for more data. Based on the mail survey, the following types of information were obtained for 150 cities and are included in the report:

- Organizations conducting tourism promotion and development programs, such as city departments, chambers of commerce, convention bureaus, and international visitor agencies;
- Activities of each organization, such as advertising, promotion, tour guides, plant visits, research, and multilingual publications;
- Budgets of each of the identified organizations, including sources of income and expenditures by activity; and
- Relationships of the organizational units in areas such as planning, programming, and funding.

Planning Handbook for Community Economic Development

This report provides methods and techniques for describing and analyzing subregional economics at the area and neighborhood levels. The intent of the handbook is to build the capacity and expertise of local organizations to effectively implement economic development projects (including tourism development) which will result in reduced unemployment and improved economic stability.

The study was conducted by the Community Development Corporation in Los Angeles, and was funded by the Economic Development Administration (lead agency), United States Travel Service and the Office of Minority Business Enterprise (U.S. Department of Commerce); the Office of Neighborhood Development (U.S. Department of Housing and Urban Development); and the Community Services Administration.

Bibliography: Economic Development Research (1971-77)

This study provided States, cities, and regions with information on all types of economic development activities, including tourism, to help them in planning and development. The publication includes a short description of current research studies on economic development and a listing of pertinent contacts.

The study has sections on research abstracts (international trade, investment impact analysis, markets and marketing, methodology, natural resources, planning, socio-economic characteristics, States and local government finance, transportation, travel and recreation); State development agencies; industrial directories; statistical abstracts; miscellaneous publications; and additional sources of economic development research information.

The study was conducted by Mid-States Research Services (Iowa) and was funded by the Economic Development Administration, the United States Travel Service, the National Association of State Development Agencies and the National Council for Urban Economic Development.

Available free upon request. Contact: Office of Policy and Research, United States Travel Service, U.S. Department of Commerce, Washington, D.C. 20230.

Foreign Visitor Arrivals: 1967-77 (Annual)

This two-page leaflet contains an 11-year history of travel to the United States by individuals' countries of permanent residence. It also provides the percent change in the number of visitors for each year during the 11-year period. The most recent edition, published in 1978, covered the period 1967-77.

Available free upon request. Contact: Office of Policy and Research, United States Travel Service, U.S. Department of Commerce, Washington, D.C. 20230.

Foreign Visitor Arrivals by Selected Ports (Annual)

This report documents, on an annual basis, the volume of foreign visitor arrivals by country of residence, type of visa, mode of travel and port of entry for 32 selected U.S. ports. (Data on Canadian travel to the United States are not included in these reports, as Canadians are not required to complete an I-94 Form upon entering this country.) The most recent available report covers calendar year 1977. USTS is currently evaluating the possibility of expanding this report to provide comprehensive analyses of the port-of-entry data, including individual State reports (aggregated totals for ports-of-entry within certain States) and an expanded number of U.S. port reports. Upon reprogramming, this new report would be issued quarterly.

Copies of the existing report are available free upon request from the Office of Policy and Research, United States Travel Service, U.S. Department of Commerce, Washington, D.C. 20230.

International Tourism Fact Sheet (Quarterly)

Fact sheets summarize most recent statistical information on international tourism to the United States, the world tourism market, U.S. travel dollar balance or American travel abroad. In addition, information is listed on new or continuing programs of USTS. Some issues include informational summaries on specialized topics, such as tourism and energy use, tourism and employment or tourism in world trade. Primarily designed for use by the press, especially travel trade publications, these summaries are also of interest to the business and financial community and the tourism industry.

Copies available free upon request. Contact: Advertising and Media Services Division, United States Travel Service, U.S. Department of Commerce, Washington, D.C. 20230.

Market Analysis: Brazil
(January 1976)

This study provides the findings of a survey conducted among residents of Brazil during the spring of 1975 to determine 1) the nature and characteristics of international travel from Brazil, 2) travel attitudes, preferences, and patterns of Brazilian international travelers. A three-stage area cluster probability sample was used to randomly select adults 18 years of age and over residing in Rio de Janeiro and Sao Paulo.

Available free upon request. Contact: Office of Policy and Research, United States Travel Service, U.S. Department of Commerce, Washington, D.C. 20230.

Market for International Congresses
(August 1975)

This study was designed to determine the present and prospective size and economic impact of the international congress and convention market. The analysis also includes an examination of the facilities and services provided and required, as well as the procedures and practices for selecting conventions sites. An extensive series of analytical interviews was conducted throughout the world in the course of the study. Considerable secondary material was also collected and analyzed. More than 200 interviews were conducted involving a broad range of organizations, administrations, and individual experts in Europe, North America and the Far East. The congresses included were non-government events with recognized serious purposes, and international by virtue of their attendance, location, or both.

Available from the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402.

1977 Vacation Travel by Canadians in the United States
(February 1979)

This report analyzes a survey series entitled "Vacation Travel by Canadians" conducted annually by Traveldata International for both the United States and Canada. The study was

sponsored by the United States Travel Service, the Canadian Government Office of Tourism, the Manitoba Department of Tourism, the Trans Canada Telephone System, and the Montreal Star, Ltd.

The survey is the 12th in the annual series and represents travel by Canadians in 1977. Canadian travel habits and traveler characteristics are described. The report incorporates series data, in some cases dating to 1966, to facilitate trend analyses.

This report contains three volumes. Volume I—Summary Report—provides information on Canadian travel to the United States as a whole. Volume II—Destinations—highlights Canadian travel to the nine United States tourist regions. Volume III—Origins—analyzes the three key Canadian vacation travel markets for United States travel. In addition to vacation data, the 1977 survey explored "non-vacation" travel to the United States from Canada—rounding out a complete analysis of overnight travel to the United States.

Available free upon request. Contact: Office of Policy and Research, United States Travel Service, U.S. Department of Commerce, Washington, D.C. 20230.

1976 Patterns of Foreign Travel in the United States

This report provides a detailed analysis of foreign visitor profile data tailored and published for each of the nine U.S. tourist regions, 23 U.S. States and territories and 14 major tourist cities. These analyses are based on a random sample of more than 33,000 Government Entry Forms I-94, and provide profile information concerning port-of-entry, point of contact in the United States, port-of-departure, length of stay, age, mode of transport, and flag of carrier.

In addition to the summary report, brochures are available on:

- Overseas regions: total overseas and Europe
- Countries: Australia, Brazil, France, Germany, Italy, Japan, Mexico, the Netherlands, New Zealand, the United Kingdom, and Venezuela

- U.S. regions: New England, Eastern Gateway, the South, George Washington Country, Great Lakes Country, Mountain West, Frontier West, Far West, and the Islands.
- States: Alaska, California, Colorado, Connecticut, Florida, Georgia, Illinois, Louisiana, Maine, Maryland, Massachusetts, Michigan, Minnesota, New Hampshire, New Jersey, New York, Ohio, Pennsylvania, Texas, Vermont, Washington, Puerto Rico, and the U.S. Virgin Islands.
- Cities: Boston, Chicago, Detroit, Honolulu, Houston, Los Angeles, Miami, New Orleans, New York City, Philadelphia, San Antonio, San Francisco, Seattle, Washington, D.C.
- Special: Age and Length of Stay, U.S. Flag Air Carriers

Available free upon request. Contact: Office of Policy and Research, United States Travel Service, U.S. Department of Commerce, Washington, D.C. 20230.

A Regional Analysis of International Travel to the United States
(February 1979)

This report is based on data compiled from the comprehensive set of 11 market research surveys conducted by USTS (see listing for USTS International Travel Market Surveys, below), and provides in-depth analyses of international travel to each of the eight U.S. Mainland regions as well as a brief overview of international travel to the U.S. Islands. Specifically, it provides a demographic analysis and trip profile of travel to those regions from the 11 major tourist-generating countries.

Available free upon request from the Office of Policy and Research, United States Travel Service, U.S. Department of Commerce, Washington, D.C. 20230.

Summary and Analysis of International Travel to the United States
(Monthly)

This report provides statistics on foreign visitor arrivals to the United States by country and region of residence, mode of transport and type of visa.

The report is based on secondary data sources and an analysis of Government Entry Forms I-94.

Monthly reports are available free upon request. Contact: Office of Policy and Research, United States Travel Service, U.S. Department of Commerce, Washington, D.C. 20230.

Summary and Analysis of International Travel to/from the United States
(Quarterly)

This report provides a quarterly and cumulative-to-date summary review of the international travel market to and from the United States. Detailed statistical information is presented on 1) Foreign visitor arrivals in the United States; 2) travel abroad by American citizens; and 3) U.S. travel dollar accounts. The report is based on secondary data sources, including the Immigration and Naturalization Service, the U.S. Department of Transportation, Statistics Canada and the Bureau of Economic Analysis, U.S. Department of Commerce.

Quarterly reports available free upon request from the Office of Policy and Research, United States Travel Service, U.S. Department of Commerce, Washington, D.C. 20230.

Summary and Analysis of International Travel to/from the United States—Calendar year 1977 and Historical Series from 1965
(Annual)

This publication, updated annually, presents a statistical summary of the international travel market to and from the United States during the period 1965 through 1977. Included are the following data analyses: 1) U.S. share of international arrivals and receipts; 2) foreign arrivals to the United States; 3) U.S. travel abroad; 4) U.S. travel dollar accounts; and 5) the U.S. share of the travel markets from six major USTS market countries. The report is based on secondary data sources including the Immigration and Naturalization Service, the U.S. Department of Transportation, Statistics Canada, Banco de Mexico, the World Tourism Organization, and the

Bureau of Economic Analysis, U.S. Department of Commerce.

Available free upon request. Contact: Office of Policy and Research, United States Travel Service, U.S. Department of Commerce, Washington, D.C. 20230.

The Total Incentive Experience: USA
(1978)

This brochure explains the concept of incentive travel, a motivating technique widely used by business. Incentive travel offers first-class vacations as incentives to employees or distributors to increase production, morale, or sales. Emphasis is on selection of U.S. destinations for incentive travel programs. Brochure is published in English, Spanish, and French language editions. Publication is designed for use by airlines, travel agents and tour operators abroad to assist in their contacts with executives of foreign companies considering incentive travel programs.

Available free upon request. Contact: Marketing and Conventions Division, United States Travel Service, U.S. Department of Commerce, Washington, D.C. 20230.

USTS International Travel Market Surveys
(1978)

Eleven individual market research reports, published during 1978, provide indepth, comparable analyses of the international travel markets from the following countries: Mexico, Japan, the United Kingdom, West Germany, France, Italy, the Netherlands, Sweden, Belgium, Australia, and Venezuela. These reports reflect the findings of major concurrent market surveys conducted by USTS in these countries in 1977, using personal, in-house interview survey techniques. The studies investigate the international travel habits, patterns, and preferences for residents of each country, including demographic characteristics, travel and trip patterns, trip expenditure patterns, consumer sources and uses of information, the U.S. travel image and competitive positioning, trip activities, motivational/psychographic characteristics, and

the effects of the U.S. Bicentennial on travel planning in 1976.

These reports are available free upon request from the Office of Policy and Research, U.S. Travel Service, U.S. Department of Commerce, Washington, D.C. 20230. When ordering, please specify the individual report(s) requested as follows: "(country name)—*A study of the International Travel Market.*"

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